

# WorkCenter & Outlook Integration Overview

We have designed the WorkCenter contact records and calendar presentations to have a similar look and feel of Outlook. We have also decided that WorkCenter would use Outlook for emailing documents. The demands placed on today's mortgage professionals require the ability to have your emailing system support heavy duty graphics and different email formats. For this reason, we at vForms have decided to rely on Outlook for emailing. WorkCenter does not support Outlook Express for the above reasons. If you are using Outlook Express, we suggest you activate your Outlook on your computer. If you have any questions regarding this, please contact one of our client service representatives.

As explained in other flash videos, we allow WorkCenter users to synchronize their Outlook contacts and calendar items into WorkCenter. WorkCenter also has an add-on feature that will allow a 2-way calendar and contact synchronization of data from WorkCenter back to Outlook. This feature is very important if the WorkCenter user employs a PDA device such as a Blackberry or Treo. This 2-way data transfer back to Outlook will allow these users to update their PDA with current WorkCenter contacts and scheduled appointments.

When you download and install WorkCenter on your computer, you will establish a WorkCenter Button on your Outlook screen. This button will allow you to take incoming emails and accomplish the following:

1. Add or create a new contact record inside WorkCenter
2. Add the email as a "Journal" item to the contact record
3. Add an attached document in the email to your WorkCenter Library of forms and letters
4. Mark this contact as a "Lead" in the contact record screen.

Please view the additional flash videos on Outlook and WorkCenter for detailed steps in accomplishing the above items. You can also view our WorkCenter 2.0 Quick Start Users Guide that can be downloaded or printed from our website [www.vForms.com](http://www.vForms.com) in an Adobe Acrobat File format.